

Method and System for Creating a Place Type to Be Used as a  
Template for Other Places

Background of the Invention

Cross References to Related Applications

5 The following U. S. patent applications, filed  
concurrently herewith, are assigned to the same assignee  
hereof and contain subject matter related to the subject  
matter of the present application.

10 Assignee docket LOT9 2000 0021 US1, U.S. patent application  
Serial No. 08/\_\_\_\_\_, entitled "Method and System for  
Creating a Theme of a Place to be Used as a Template for  
Other Places";

15 Assignee docket LOT9 2000 0022 US1, U.S. patent application  
Serial No. 08/\_\_\_\_\_, entitled "Method and System for  
Automatically Accessing, Processing, and Managing the Data  
In a Place";

Assignee docket LOT9 2000 0023 US1, U.S. patent application  
Serial No. 08/\_\_\_\_\_, entitled "Method and System for

LOT9 2000 0025 US1

Importing HTML Forms";

Assignee docket LOT9 2000 0024 US1, U.S. patent application  
Serial No. 08/\_\_\_\_\_, entitled "Method and System for  
Importing MS Office Forms";

5 Assignee docket LOT9 2000 0026 US1, U.S. patent application  
Serial No. 08/\_\_\_\_\_, entitled "Method and System for  
Identifying and Displaying Information That Is New or Has  
Been Updated In a Place";

10 Assignee docket LOT9 2000 0027 US1, U.S. patent application  
Serial No. 08/\_\_\_\_\_, entitled "Method and System for  
Providing Task Information in a Place";

15 Assignee docket LOT9 2000 0028 US1, U.S. patent application  
Serial No. 08/\_\_\_\_\_, entitled "Method and System for  
Providing Synchronous Communication and Person Awareness In  
a Place";

Assignee docket LOT9 2000 0029 US1, U.S. patent application  
Serial No. 08/\_\_\_\_\_, entitled "Method and System for  
Providing a Separate Browser Window With Information From  
the Main Window In a Simpler Format";

Assignee docket LOT9 2000 0030 US1, U.S. patent application  
Serial No. 08/\_\_\_\_\_, entitled "Method and System for  
Allowing In Place Editing of Office Documents In a Place".

5 The present application is also an improvement upon the  
following copending, previously filed applications, assigned  
to the same assignee:

Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Interconnecting Secure Rooms", assignee docket L0999044;

10 Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Dynamic Management of Web Site", assignee docket L0999045;

Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Presentation of Room Navigation", assignee docket L0999046;

15 Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Independent Room Security Management", assignee docket  
L099047;

Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Dynamically Generating Viewable Graphics", assignee docket  
L0999048;

Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Dynamic Browser Management of Web Site", assignee docket  
L0999049;

5 Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Room Decoration and Inheritance", assignee docket L0999051;

Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Online/Offline Uninterrupted Updating of Rooms in  
Collaboration Space", assignee docket L0999052;

10 Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Client Replication of Collaboration Space", assignee docket  
L0999053;

Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Browser Creation and Maintenance of Forms", assignee docket  
L0999054;

15 Serial Number 09/\_\_\_\_\_, entitled "System and Method for  
Browser Definition of Workflow Documents", assignee docket  
L0999055.

The above-identified patent applications are incorporated  
herein by reference.

## Technical Field of the Invention

5 This invention relates to web technology. More particularly, it relates to the creation and use of collaboration sites on the Internet or on an Intranet client/server system and to the graphical user interface used in Internet communications.

## Background Art

10 The Internet and the World Wide Web (WWW) provide intra-enterprise connectivity, inter-enterprise connectivity and application hosting on a larger scale than ever before. By exploiting the broadly available and deployed standards of the Internet and the WWW, system users and designers can leverage a single architecture to build client/server applications for internal use that can reach outside to  
15 customers, business partners and suppliers.

20 Collaboration requires simultaneous communication between individuals on a project team. Typically, this has required that the team members work in the same location. Phone and video conferencing has enabled some remote work on the part of team members. Also, because of the growth of

the Internet, collaboration using web technologies has been attempted, primarily using electronic mail (E-mail), Internet chat rooms, electronic whiteboards, and conferencing software. The most useful has been E-mail, but this approach results in a large trail or thread of notes as collaboration on a project advances, and these notes have no home or place to reside which is accessible by all team members substantially instantaneously and simultaneously. People often enter such a thread at different points, and such threads are not efficient in coordinating the work of many different people on a team which may include in-house developers and others, such as remote contractors, outside of an enterprise's firewall.

In order for such disperse teams to have the same, or substantially the same, collaboration environment as individuals working in the same physical office, a system is required which facilitates instant messaging, voice conferencing, electronic white boarding, and text and non-text file exchange. Such a system needs to provide a collaborative electronic room, or space, which is easily configured for use by team members without substantial administrative or application development support, and preferably include both groupware and project oriented applications such as shared folders, file exchange,

workflow, group calendars, threaded conversations, version control, file locking, file merging, and security.

There is a need in the art for such a system which is easy to set up and which enables diverse and remote teams to become immediately productive in a secure environment. It would be, further, most desirable to allow such a collaborative environment to be set up without administrative support, that is by members of the team itself, using a familiar and easy to use browser user interface. Members of the team, acting with manager or author authority, and using such a browser interface without involving administrative or application development support, need to be able to set up a folder or room for each project element, such as a source code component, with version control, workflow elements, and group calendaring for tracking the project or project element with respect to approvals and deadlines. Such a room needs to receive from team members reports and have them routed to appropriate team members for review, resolution, and approval.

The WWW is a collection of servers on an IP (Internet Protocol) network, such as the Internet, an Intranet or an Extranet, that utilize the Hypertext Transfer Protocol (HTTP). Hereinafter, "Internet" will be used to refer

to any IP network.

HTTP is a known application protocol that provides users with access to files, which can be in different formats, such as text, graphics, images, sound, and video, using a standard page description language known as Hypertext Markup Language (HTML). Among a number of basic document formatting functions, HTML allows software developers to specify graphical pointers on displayed web pages, commonly referred to as "hyperlinks," that point to other web pages resident on remote servers. Hyperlinks commonly are displayed as highlighted text or other graphical image on the web page. Selection of a hyperlink with a pointing device, such as a computer mouse, causes the local computer to download the HTML associated with the web page from a remote server. The browser then renders the HTML into the displayed web page.

Web pages accessed over the Internet, whether by a hyperlink, opening directly via an "open" button in the browser, or some other means, are commonly downloaded into the volatile cache of a local computer system. In a computer system, for example, the volatile cache is a high-speed buffer that temporarily stores web pages from accessed remote web sites. The volatile cache thus enables a user





A method and system is provided for creating a place in collaboration space by creating a first place; and saving the first place as a place type template from which other places may be created in the collaboration space.

5 In accordance with an aspect of the invention, there is provided a computer program product or computer program element for creating a place in collaboration space by creating a first place; and saving said first place as a place type template from which other places may be created  
10 in said collaboration space.

Other features and advantages of this invention will become apparent from the following detailed description of the presently preferred embodiment of the invention, taken in conjunction with the accompanying drawings.

15

#### **Brief Description of the Drawings**

Figure 1 is a schematic representation of a typical server/client system implementing the collaboration space of the preferred embodiments of the invention.

Figure 2 is a schematic representation of various server and client components implementing the collaboration space of the preferred embodiments of the invention.

5 Figure 3 is a schematic map illustrating Domino objects relating to the object model of the collaboration space of the preferred embodiments of the invention.

Figure 4 is a schematic map of the object model implementing the collaboration space of the preferred embodiments of the invention.

10 Figure 5 illustrates the components of a collaboration space user interface.

Figure 6 is a flow chart representation of generation of collaboration space data objects.

15 Figure 7 illustrates a typical collaboration space user interface.

Figure 8 is a schematic representation of a directory structure, along with the files in an exemplary collaboration space server.

Figure 9 is a combined flow chart and system diagram illustrating the rendering of a user interface and the caching of skins.

5 Figure 10 illustrates the conversion of a place into a place type, or template, from which additional places may be created.

Figure 11 illustrates a user interface showing the directory structure of a collaboration space place type.

10 Figure 12 illustrates a user interface showing the directory structure of collaboration space places.

Figure 13 illustrates a user interface showing descriptions provided of selectable place types.

### **Best Mode for Carrying Out the Invention**

### ***Architecture Overview***

15 Referring to Figure 1, a broad overview of a system implementing the collaboration space technology of an

exemplary embodiment of the system of the invention is presented.

Server 100 includes a Domino server 104, HTTP server 106, QuickPlace extensions 108, and open storage 130.

5 Client 102 includes a QuickPlace user interface 110 and browser 112.

QuickPlace open storage 130 includes all the databases and templates that implement the collaboration space.

Domino 132 and active directory 134 define the collaboration process. The user interfaces with the system through

10 browser 112. .NSF agents 114, 116, Java 118 and LotusScript 120 represent components and templates downloaded from server 100 in support of collaboration space at client 102.

15 All the extensions 108 are keyed off the URL, as will be further explained hereafter.

Notes API 136, Notes designer 138 and client 140, external applications 142, including Java agents 144 and LotusScript 146, are located off of open storage 130. Open storage 130 is storage where a document can be communicated, such that external applications 142 may manipulate it.

20 QuickPlaces, pages, folders, can be created and changed, and data 148 can be imported and exported, using agents in Java

144 or LotusScript 146.

QuickPlace is primarily concerned with representing the collaboration space. Consequently, designers and consultants are able to integrate into that space custom features and data from other applications. HTML forms 122, written using an HTML editor 124, skins 248 (HTML 244 and QP tags), external files written using Java 118, and MS office documents 250 from MS office 228, may be imported to server 100 by dragging and dropping 111 from local storage 502 into an upload control panel 240 in browser 112.

An alternate client 126 and encapsulated place types 128 may be provided from which other collaboration spaces 129 can be created that take advantage of the QuickPlace storage model, providing functionality which can be manipulated using browser 112, including the integration of external technology providing opportunity for deep customization.

### ***Server/Client Components***

Referring to Figure 2, in accordance with an exemplary embodiment of the invention, several components comprise

QuickPlace server 100 and client 102.

QuickPlace is built on top of the Domino server 104. In the case of a stand alone installation, a subset of the Domino server is installed. Server 100 also includes HTTP  
5 server 106, or the optional MS IIS server 150. QuickPlace extension 108 is where we built most of the collaboration space implementing code exists the server 100. Server 100 also includes a spell checker 152 and a text to GIF converter (Limerick).

10 Client 102 includes rich text edit control 162, and applet 164 with which to apply various attributes and is a key component of the QuickPlace experience. Upload control 166 is used to attach and upload files, such as bringing in an agent and uploading it to a place. This is also used to  
15 bring in an imported HTML form or a different skin. Upload control is implemented to allow ease of use via drag and drop. Java script 118 includes code downloaded to the client to complete the generation of HTML pages.

### ***Collaboration Space Object Model Overview***

Referring to Figure 3, the collaboration space of the preferred embodiment of the invention, referred to as QuickPlace, is implemented with an object model which comprises very few objects, very few concepts in order to make it easy to build and manage. And the fewer concepts, the better.

Referring to Figure 3, the object model is independent of its implementation. There exists a place 172 that has rooms 174, and there are pages 182 in those rooms. And then there are members 190 of the place. Those four objects 172, 174, 182 and 190 are the primary objects.

Folders 176 add more complexity to the model, but bring a lot of benefit as well. Pages 182 are organized within folders. Two further objects are primarily visible to the designer of the place. And these are forms 178 and fields 180.

Place type 196 is a more advanced object, and is an object from which a place 172 is created. Place type 196 represents the foundation for building true collaborative applications. Everything created in building collaboration space is done in a place 172. Once such a place is created, it can be made a template 266 (Figure 6) and copied as a



place type 196. Once it becomes a place type 196, it is available for use by others for building additional places 172 that include the format, look and feel, and other characteristics of the original place.

5           This is illustrated in Figure 10, where a first place 360 is converted by QP extensions 108 into a place type, or template 364 from which additional places 366 may be created.

10           Room type 198 is an object provided for creating rooms 174 which are of a given type.

15           The last two objects illustrated in Figure 3 are skins 200 and PlaceBots 184. Skins 200 control everything about the user interface, including layout and style. Layout defines the positioning of components on the screen. Style defines the form and colors of those components. A PlaceBot 184 is an enhanced agent, enhanced in the sense that it enables the use of Java or Lotus Notes or equivalent text editors. Once written using such an editor, and uploaded to a place 172, the server compiles the PlaceBot into an agent, reporting any errors. The agent resulting from a compiled PlaceBot can be scheduled to run at certain times, or upon opening a form. That is, the PlaceBot may be associated

with a form, such as a sales order which, when opened, will cause the agent to execute. Thus, PlaceBots 184 are an essential part of building collaboration applications, for they are the primary repository for custom logic.

5 Referring further to Figure 3, a preferred implementation of the object model heretofore described uses Lotus Notes/Domino concepts and objects. Thus, Notes/Domino file system directory 202 represents place 172; database 204 represents room 174; folder view 206 represents folder 176; 10 pages 182, members 190, forms 178, fields 180 and skins 200 are represented by notes 208, 210, 212, 214, 220, respectively.

Place 172 is represented as a file system directory. So whenever a place called Acme is created, a file system 15 directory 202 called Acme will be instantiated. Within that directory 202, there are a number of objects. Each room 174 is a Notes database 204. Folders 176 are implemented as Notes folders or views 206 depending on what's more convenient for the particular folder.

20 Pages 182 are a combination of data notes, forms and sub-forms 208. A member 190 is a data note 190 in a context room 174. Forms 178 and fields 180 are data notes. Place

type 196 is a directory\* 216 that contains all the rooms 174  
that make up that place type. A room type 198 is a template  
218. Skins 200 are a note 220 and PlaceBot 184 is an agent  
222.

5

### ***Notes/Domino Implementation of the Object Model***

Developers familiar with the Domino Object Model  
(Domino OM) will be able to leverage their existing skills  
when developing on the QuickPlace platform. "PlaceBots" for  
example are actually implement Domino Agents, and it is  
possible to create and test them on Domino Databases.  
Within the QuickPlace object model (OM), however, there are  
some divergences from the Domino OM. For example,  
QuickPlace forms 178 are not the same as Domino Forms.  
QuickPlace forms more closely resemble Domino Documents,  
because they are created using a Domino form, and contain a  
Domino text field with a value of "h\_Form". The value of  
"h\_form" tells QuickPlace that this Domino document should  
be rendered in a browser as a QuickPlace form 178.

This structure provides flexibility for Web  
applications with less complexity than if Domino Forms were  
used. For example, in a default QuickPlace, a user can

create a new QuickPlace form 178. The user chooses which fields to include in form 178, in what order they should appear and what text and or graphics should appear near them. To create this sort of instant structure on the Web using Domino Forms would be very complex indeed. QuickPlace has extended this concept of being able to use HTML to define forms 178 by enabling the creation of custom QuickPlace forms using imported HTML 122. These Forms not only make use of Web authoring technologies such as Java Script, but also have the back end support of Domino. This back end logic is implemented via tools such as PlaceBots (Domino Agents) 184. This means that forms 178 have the ability to not only to define the look and feel of visible parts of an application, they also have the potential to initiate workflow and many other powerful automated features.

QuickPlace forms 178 have been optimized by stripping away many of the Notes features not required when used on the Web. A another advantage of this structure is that it enables the use of Web authoring tools to extend the objects. For example, with respect to QuickPlace forms, it is possible to modify forms using XML, Java Script and HTML and any other Web tools. Knowledge of Java Script and HTML are more common than Domino Designer skills, thus

making the QuickPlace a very open platform. Some parts of the QuickPlace OM implement Domino/Notes functionality in different ways to a standard Domino application. For example, QuickPlace uses Domino's security and authentication model as a basis for its management of access to QuickPlaces. However, instead of primarily utilizing the Domino Directory, QuickPlace also uses a Contacts1.nsf database for each QuickPlace.

### ***Containment and Association of Objects***

Referring to Figure 4, this object model is further described. Figure 4 illustrates selected QuickPlace objects, the directory structure and how Objects relate to each other within the hierarchy. This model provides a visual representation of the containment and association between objects.

### ***QuickPlace Server***

The highest level of the model is the QuickPlace Server 170. Within server 170 are all of the QuickPlaces 172 as well as the resources they access to finally render Web applications.

This Figure 4 displays the Model focusing on QuickPlaces. The following explanation, written from a programmers perspective, describes each of the objects of the model and they can be accessed in an application.

5 QuickPlace uses notes for many of its objects 182, 190, 178, 180 and 200, so that objects in the Place can be organized more easily. Table 1 sets forth the QP objects and their Notes/Domino equivalents. As an example of how design Notes are implemented consider the Table Of Contents (TOC). The Table Of Contents is a list of pages, folders and tools such as the Customize Area. Domino Folders may be listed using a link document, or Note.

**TABLE 1: QUICKPLACE OBJECTS AND DOMINO EQUIVALENT**

<u>QuickPlace Object</u>	<u>Domino Equivalent</u>
15 QuickPlace Server	File Directory
Place	File Directory
Page	Data Note, Form & Subform
PlaceBot	Domino Agent
Theme	Data Note
20 Member	Data Note in Contacts1.nsf
Subroom *	NSF Database
SubroomTheme	Data Note
SubroomMember	Data Note in Contacts1.nsf
Room	NSF Database
25 Folder / TOC	Folder or View
Form	Data Note
Field	Data Note

\* Subrooms contain their own set of Folder, Page, Form,  
Field, PlaceBot & Subroom Objects

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5 QuickPlace Server 170 is a file directory containing  
all Places and Resources. The Domino equivalent is a file  
directory 202 named "quickplace". This identifies the main  
folder 176 for a QuickPlace server 170. If the QPServer 170  
is running as a stand alone, this folder will be in the  
QuickPlace data folder. For example

D:\QuickPlace\Data\quickplace.

10 If the QPServer 170 is running on top of a Domino server the  
folder will be the Domino Data folder. For example

D:\Lotus\Domino\Data\quickplace.

To locate QuickPlace Server 170 in PlaceBots and get  
access to all of its databases, a LotusScript method  
15 GetDbServer is executed together with a test that the Path  
to databases starts with "QuickPlace".

### ***Place Object***

Place object 172 is a directory in the "QuickPlace"

directory grouping resources for a Place. The Domino equivalent is a file directory bearing the name of the QuickPlace. Place object 172 is a directory that brings together a Place for organizational purposes. It also identifies the NSFs 114 as belonging to the place 172 by bearing the name of the QuickPlace. As distinguished from a place object 172, the main room 174 in a QuickPlace is a database called Main.nsf. Place object 172 groups and identifies the Main.nsf resources for the Place and any subrooms 194 in the Place. Place object 172 contains several files. There is a Main.nsf, Contacts1.nsf and a Search.nsf file. If the QuickPlace has a Subroom 194 there will also be an NSF file with its name starting with "PageLibrary". Each of these page library files is a Room 174.

The place object in PlaceBots 184: place object (directory) 172, contains the databases which form a place. When writing PlaceBots, one can search for this directory by using the name of the QuickPlace. In this directory will be found all the databases will belong to that place 172. This file directory's name is the name of the QuickPlace. For example, if the QuickPlace is called "Millennia", this directory has the following path within the QuickPlace server 170:



\millennia

To find the place object 172 for the Millennium Place in LotusScript the script procedure of Table 2 may be used:

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**TABLE 2: SCRIPT PROCEDURE FOR FINDING A PLACE**

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```
5 Dim ndbPlace As NotesDatabase
  Set dirPlace = New NotesDbDirectory( g_sServerName )
  Set ndbPlace = dirPlace.GetFirstDatabase( DATABASE )
  sNdbPlaceFilepath = ndbPlace.FilePath
10 If Instr(1, Lcase( sNdbPlaceFilepath ),
  |quickplace\millennia| ) Then
  '//the Place is found
```

---

### *Room Object*

Room object 174 is the main container for a Place, containing a collection of pages and tools. The Domino Equivalent an NSF Database. The room 174 is the main container for a QuickPlace's content. For example, when using the Millennium Place, most of what is seen is contained in the Room object. The Room object is always called Main.nsf, and holds folders 176 and pages 182 for the QuickPlace, as well as managing links to any subrooms 194 in the place object 172. Room object 174 uses elements held in other databases. For example many of the standard images QuickPlace displays are in a resources object (not shown).

Each room 174 has its own security and authentication, and the information required to do this is contained in databases such as Contacts1.nsf. A room 174 breaks down a place 172 into smaller areas to help define structure. Each room 174 has its own security and authentication. This allows separate user groups. It also means that subrooms 194 can be created for separate projects, forming a separate shared space. The room object 174 then forms a common entry point where shared resources can be stored.

10           The room object in PlaceBots: to locate a room 174, one looks in the main QuickPlace Server 170 directory, then looks into the room object (a directory bearing the name of the QuickPlace), then looks for a database called "Main.nsf".

15           Returning to previous LotusScript example of locating a Place 172 (Table 2), the match string can be extended from

"quickplace\millennia" to

"quickplace\millennia\main.nsf"

to find the room object 174, as set forth in Table 3.

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**TABLE 3: SCRIPT PROCEDURE TO FIND A ROOM OBJECT**

---

```
Set dirPlace = New NotesDbDirectory( g_sServerName )
Set ndbPlace = dirPlace.GetFirstDatabase( DATABASE )
sNdbPlaceFilepath = ndbPlace.FilePath
5 If Instr(1, Lcase( sNdbPlaceFilepath ),
|quickplace\millennia\main.nsf| ) Then
'//the Room id found.
```

---

To access elements contained in a room 174, the views and folders 176 in the room are accessed. For example to find the elements visible in the Table Of Contents (TOC), the "h\_TOC" view is used.

The Room object 174 in HTML is visible in URLs as the "main.nsf". To access room object 174 most easily, a relative path is used from the current object if it is in the same Place 172. For example, when creating a URL link from a subroom 194 to a room 174, the URL begins as follows:

```
<a href="../../../Main.nsf/
```

where the "dot dot slash dot dot slash" syntax is a part of the URL, not an abbreviation for this example. Using this relative URL makes the URL more robust. In other words,

this URL can be used to find the (Main.nsf) room 174 for any place 172.

Room fields 180 used to define rooms 174 are set forth in Table 4.

5

**TABLE 4: FIELDS DEFINING ROOMS**

<u>Field Name</u>	<u>Description</u>
h_HaikuName	The name of this Place
h_AreaType	The name of the template used to create this room.
10 h_AreaParent	The name of the parent database
h_ShowSecurity	If h_SetSecurity = 1, the QuickPlace server sets h_ShowSecurity to 1.
15 h_SetCalendar	Determines if the Calendar will be visible in a Room. If the field has the value of "1" a link to the Calendar will be displayed in the sidebar
20 h_SetSecurity	This field works in conjunction with the h_ShowSecurity field. It is only valid for Readers and Authors, because Managers must always be able to edit security of a Room. If the field is set to "1" a link to the Security page will be displayed in the sidebar for Readers and Authors (if they select Security in this case they will see only their own information)
25 h_MailDb	The name of the database that receives email addressed to this Place.

## Folder Object

A folder object 176 is an object for indexing content, grouping related pages 182, and dividing a room 174 into sections without imposing new security. The Domino equivalent is Notes folder or view 206, and Notes folders 206 have three functions. For the user, they provide a logical grouping of related documents. This makes it easier for the user to find documents, and allows people with a shared interest to work an area of a QuickPlace. The other way of using folders is in the user interface, or "User" folders. Within user folders there are seven different types:

1. Standard List
2. Headline
3. Slide Show
4. Response List
5. Ordered List
6. Table Of Contents
7. Index

Folder types 1 to 5 are all available as styles for new, custom folders. From the a site manager's perspective, a

Folder allows a QuickPlace to be divided into areas for separate groups of people, without having to be concerned about access control which would be necessary if a Subroom 194 were used.

5 Fields include the following:

"h\_LastAttachmentDirectory": used when getting attachments. This field enables users to quickly upload attachments. For example, each time a Layout file is uploaded, QuickPlace knows where to go looking for the file. This path  
10 information is sourced from this field.

"h\_DirtyAesthetics Number": indicates which items should be checked (once a part of the aesthetics has been tweaked, a check mark indicates that the part has been changed).

h\_AreaHasAesthetics: indicates if a Room has its own  
15 aesthetic settings enabled. If the field value is "1" the Room has had the aesthetics tweaked.

The third way that folders 176 are used is to allow developers to locate elements in a QuickPlace. To a developer, folders are indexes that allow look ups,  
20 therefore giving programmatic access to elements.

When any page renders in a Browser, the time it takes to render is directly dependant on the amount of information to be downloaded. The amount of information required to render a Folder is less than for a Page. When Pages appear in Edit mode, there is yet more information required to render it. Therefore, the quickest load time for a QuickPlace by first using a folder 176 as the first page the user sees when upon selecting a place. Once users have visited a folder 176, a subset of the resources used to render a page 182 will already have been downloaded. The folders used by developers are slightly different to than the folders users would use. The h\_Index lists the published pages in the Place and appears as the standard index of a Place, and the h\_TOC is the table of contents list.

Some of the folders in look ups by developers are set forth in Table 5.

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**TABLE 5: VIEWS USED TO REFERENCE OBJECTS**

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<u>View Name</u>	<u>Description</u>
h_Index	Provides a list of all published Pages in a Room, listed by h_UNID, the unique identifier for a Page. Lists all published items in a Room, this not only includes Pages but all of the Objects in

a Place. For example, Pages, PlaceBots, Fields, Skins and Forms.

h\_QDK

Every Design Note in a Place. The h\_QDK view contains a form formula to open different documents using different forms. For example: If the field "h\_Type" is "0" then use the form named "h\_Page". The result of this form formula is that the QDK view allows developers to inspect the properties of some Design Notes. The supported types are: "h\_Page", "h\_Folder", "h\_Room", "h\_SubRoom", "h\_Error" and "h\_RoomType".

h\_TOC

List of all items displayed in the Table Of Contents. Items must have the "h\_IsInTOC" field with a value of "1" and be published with no replication-save conflict.

(All)

Every item in the Room. Sorted by the h\_Name field: the readable name of the item. For example "Welcome", representing the default Welcome page.

The Place Object in PlaceBots: Internally, default QuickPlace Folders have readable titles. For example the response folder discussion" has the internal name of "h\_Discussion" in the "h\_SysName" field. A new response list style folder is called "SchwatzRaum" ("chat room" in German). The internal name of the SchwatzRaum Folder is: "h\_F49791727035ACD1C12569510063087C" (which means ("h\_F49791727035ACD1C12569510063087C" in German). This unique identifier can be used in PlaceBots to locate the Folder. A lookup can be done in the "h\_Folders" view of a



QuickPlace to find the readable name of the folder. Another solution is to retrieve the name of the field by accessing the value in the h\_SysName field. The Table of contents and the Index are special user Folders 176. Only one TOC and one h\_Index exists per Room 174 or Subroom 194. They exist from the moment the Place or Room is instantiate, and change them.

### ***Folder Fields***

The following Fields are used to define data notes that render as Folders. Folders exist in a visible form within a QuickPlace. In other words they can be viewed by opening the NSF file in the Notes Client or Domino Designer. In conjunction with this view, a data note exists, providing information about that Domino View or Folder. Table 6 lists the fields are contained in the data note and provide information about the Domino View or Folder.

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**TABLE 6: FIELDS USED TO DEFINE FOLDERS**

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<u>Field Name</u>	<u>Description</u>
h_FolderStyle	When creating a new folder, one is given the choice to create a new folder based on a number of templates. This field

denotes which type of folder has been created.

"1" = Standard List

"3" = Headline

"4" = Slide Show

"5" = Response List

"7" = Ordered List

h\_FolderStorage

The "internal" name of the folder, in other words, the name by which it is known to the system. The value of this field is used in documents to tell QuickPlace in which folder it should be used.

h\_CanAddPages

When creating a new folder, the manger is presented with the options, to the question "Who can add pages to this folder?". If only managers is chosen the value of "0" is written to this field. The default is "" which means all authors can add pages to this folder.

---

### *Form Object*

A form object 178 is a document used to create new QuickPlace content. The Domino equivalent is a data note of type "h\_Form". Form object 178 is a resource used to create, manage and display content, therefore defining the schema of the application. Forms contain fields to hold data, therefore creating and displaying content. Forms can also contain scripts within them to provide logic within the Page. For example, a form can contain form validation to make sure that a field contains only numbers. Forms can also initiate processes outside the page. This is done by

The following table shows the results of the regression analysis for the dependent variable  $\ln Y$  (ln of the dependent variable) and the independent variables  $X_1$  to  $X_6$  (ln of the independent variables). The table is divided into two parts: the first part shows the results of the regression analysis for the dependent variable  $\ln Y$  and the independent variables  $X_1$  to  $X_6$ , and the second part shows the results of the regression analysis for the dependent variable  $\ln Y$  and the independent variables  $X_1$  to  $X_6$ .

5

## Form Fields

Table 7 sets forth the fields 180 used to define the structure of a form 178.

TABLE 7: FIELDS USED TO DEFINE FORMS

	<u>Field Name</u>	<u>Description</u>
5	h_FormDescription	The content of this field appears as the description of the form appearing in the "New" page.
	h_WorkflowType h_ApprovalCycle	Allows 1-4 approvers and some other options. This is normally set to "h_Standard".
10	h_EditorInChief	Allows 1 approver and fewer options.
	h_MultipleEditors	By setting this field, all members of QP to edit pages created with this form.
15	h_Standard	None of the above.
	h_SetPageComponent	sView Should = h_FieldDefinitions

### ***Field Object***

Field object 180 is used to construct (HTML formatted) input fields in forms 178. The Domino equivalent is a Data note of type "h\_Field". Fields are constructed from the Domino Form "h\_PageUI" with a the field h\_Type set to "h\_Field".

QuickPlace field object 180 defines the structure of the container, not the content. The values contained in a

page 182 are contained by the page, not the fields 180. The  
h\_FieldType attribute to a field 180 determines what sort of  
field it is. This determines what the field will do when  
it is rendered in a browser. For example, a field 180 of  
5 type h\_DateControl will provide the user with a date picker  
widget.

Domino fields are used to define the attributes of  
QuickPlace fields 180 are set forth in Table 8. QuickPlace  
fields 180 are drawn to the screen as HTML, they are not  
10 created by a Domino  
Field in a Domino Form.

---

**TABLE 8: FIELDS USED TO DEFINE FIELDS**

---

<u>Field Name</u>	<u>Description</u>
h_IsUser	Defined h_True means this is a custom 15 form
h_PublishInFolder	UNID of the folder + " " +
h_FolderStorage	name of the folder
h_Name	"Import" and is related to the 20 h_SystemName field which often has a similar value such as "h_Import".
h_FieldLabel	Instructional information that might be useful for someone editing this field. Similar to the Static h_FieldType. Containing information to help the user, 25 but only displayed in edit mode." For example: <script> (h_CurrentSkinType ==





Pages form the basic units of content, relying on the structure of QuickPlace to create, manage and render them in a Web browser. It differentiates structure and content cleanly. Notes structural elements such as Forms Views and so on provide structure, whereas Notes Documents provide pure data content. In the Domino environment the division between structure and content becomes blurred. This is because when the data in a document is being represented in a Web browser, it is possible to use the data to format itself using HTML. The data is able to start defining structure by creating HTML links, tables, references to images and so on. In the QuickPlace OM, the same is true. Pages can be created in a number of ways. Table 9 sets forth the fields used for defining page objects.

---

**TABLE 9: FIELDS DEFINING PAGE OBJECTS**

---

h_NotInSearch	Having the value of "1" will exclude the field from being included in a full text search. This allows functional content in fields such as Java Script or static text to evade returning a hit during searching.
h_Position	Indicates the fields position of appearance in a form. Typically numbers such as 100 are used.
h_FieldFormat	"h_FieldFormat" indicates formatting options, "h_All" "h_BannerOptional"



## "h\_BannerRequired"

	h_BannerRequired	Always display subject as a banner at top of page
	h_BannerOptional	Allow user to choose banner or not
5	h_NoBanner	Do not display the subject on the page
	h_FieldIsRequired	1 = The field is required and the user will be prompted if they do not fill it out.

---

## *Page Fields*

10           Page Object in LotusScript and Java Script: developers  
wanting to customize pages 182 will generally want to  
manipulate the page's field 180 values. Fields existing in  
a Page are generally rendered to the HTML document in the  
background as Java Script variables. They are then visibly  
15           rendered via document.write() functions. If a field exists,  
it can be accessed in the browser via a variable with the  
same name as the field.

          The PageBody Field holds the main content or "body" of  
the page.

20           Table 10 sets forth the fields 180 used to define page  
182 documents in QuickPlaces.

TABLE 10: FIELDS USED TO DEFINE QUICKPLACE PAGES

<u>Field Name</u>	<u>Description</u>
h_Form	The QuickPlace form used to create this page. This is not the Domino "Form" field which denotes which form Domino links the file to. The Domino "Form" field will contain "h_PageUI" for virtually all objects in a QuickPlace.
h_PageType	This field is set to null when the document is a visible document. Only when the object is in design mode do the other values appear:
	"h_Response" the document is a response to a topic document. This value is only valid in response folders.
	"h_Revision" this means that the document is being revised, and is not available for public access.
	"h_Mail" means that the document is a mail document, being either sent or received by QuickPlace.
h_Originator	The creator of this page. This field contains a full hierarchical name, for example: "CN=David Wyss/OU=QuickPlaceName/OU=QP/O=ServerName". All users have the second OU part of the name set to QP. This is done so that when QuickPlace is used on an Overlay server (QuickPlace and Domino together) QuickPlace can avoid conflicts between Domino registered users and QuickPlace users.
h_NameIsBanner	Denotes if the page's name should be displayed as a banner. If it is to be displayed as a banner, this field contains the value "1". Setting this field is done when the user clicks on

the "Show the title, author and date on page?" checkbox.

---

5       The Java Script "document.write" method is used when using the PageBody to write out HTML content in a QuickPlace page. This field can be printed onto the screen via a document.write(PageBody) method called in a QuickPlace document. The following is an example of using this technique.

10       In a Placebot, write the contents of the document into the PageBody field. If the PlaceBot has not run, or not run correctly, the PageBody field will be empty. If the document is displayed in a form where the PageBody Java Script variable is not declared, an error will be reported.

15       To avoid an error through an undefined variable, use the "typeof" operator. This test assigns a message string to the sPageBodyMessage variable and prints that instead of the PageBody. To customize this message, the text in quoted on the PageBodyMessage line is changed. Then the following is

20       included in the HTML document:

```
<script language=JavaScript>
    if ( typeof( PageBody ) == "undefined" ) {
        var sPageBodyMessage = 'Run the Mapperizer PlaceBot
```

to see a site map here...';

```
document.write( sPageBodyMessage )
```

```
} else{
```

```
document.write( PageBody )
```

```
}
```

```
</script>
```

Page Object in HTML: some of the most commonly referenced Java Script variables in Pages are set forth in Table 11.

**TABLE 11: COMMONLY USED Java Script VARIABLES IN PAGES**

<u>Field Name</u>	<u>Data Type, Description</u>
h_Name	String, readable name of the Page
PageBody	String, content of the page.
h_SystemName	String, the internal name of a page. For example, 'h_Welcome'
h_Originator	String, full Notes format name of the document creator For example: 'CN=Anna Rath/OU=Millennia/OU=QP/O=Server';
h_IsPublished	String, number representing "1" for published or "0" for not published.
h_LastTimePutAway	String, representing the date and time the Page was last saved '09/03/2000 07:54:08 PM'
Form	String, Domino Form name used to create the Page. Most documents in a QuickPlace are created with the

'h\_PageUI' Form. The value that differentiates fields is the h\_Type field.

5	HTTP_COOKIE	String, all cookies available to that Page.
	HTTP_HOST	String, name of the server. For example 'millennia.com'
	HTTP_REFERER	Page used to send the user to this page.
10	HTTP_USER_AGENT	String, browser used to access the current Page. For example: 'Mozilla/4.0 (compatible; MSIE 5.0; Windows NT; DigExt)'
15	REMOTE_USER	String, full name of the person reading the Page, for example: 'CN=Doug Mudge/OU=Millennia/OU=QP/O=Server';
	Server_Name	String, the server name, for example: 'dwyss.lotus.com'
	h_DocSize	Integer, size of the page, for example: 4705
20	h_ModifiedDate	String, date and time the page was last saved, for example: '09/03/2000 07:54:05 PM';

---

Using Notes name format in pages can be done with the following Java Script Function:

```
function fnGetSimpleName(sTxt) {  
    iTxtStart = sTxt.indexOf('=');  
    iTxtStart++;  
    iTxtEnd = sTxt.indexOf('/');  
}
```

```

    if(iTxtEnd == -1) iTxtEnd = sTxt.length;
    sTxt = sTxt.substr(iTxtStart,iTxtEnd - iTxtStart);
    return sTxt;
};
5    return fnGetSimpleName('CN=Doug Mudge/OU= Millennia/OU=
    QP/O=Server')

```

This Java Script will return the string "Doug Mudge"

### *PlaceBot Object*

10 A PlaceBot object 184 is a Java or LotusScript Domino Agent, used to create or manipulate QuickPlace objects automatically. Domino Equivalent: Domino Agent.

15 For Java and LotusScript programmers, the PlaceBot is the main way of implementing sophisticated functionality to a QuickPlace. Within the bounds of an HTML document, industry standard authoring tools such as HTML are used. To make links between Objects and manipulate QuickPlace Objects, PlaceBots are used. The PlaceBot object is further described in copending U.S. Patent application S/N \_\_\_\_\_, assignee docket LOT9 2000 0022 US1.

## *Theme Object*

A theme object 186 is a group of files which defines the look and feel of a QuickPlace. The Domino equivalent is a group of data notes.

5 Themes are a mechanism for determining the layout and appearance of a QuickPlace. They also help introduce functionality, and although not their primary function, some content. There are two types of themes 186 in QuickPlace. User defined or custom themes and default themes.

## *Subroom Theme Object*

10 The subroom theme object 188 is a subset of themes 186 in a QuickPlace. The Domino equivalent is a data note. By default, subrooms 194 inherit the theme 186 being used by the (main) room 174. Only when the theme being used in the  
15 subroom 194 has been modified, does it act independently of the room 174.

## Member Object

A member object 190 is a data note listing a user in the Contacts1.nsf. The Domino equivalent is a note in contacts1.nsf. Members 190 are records specifying user-access to a room 174. A member note contains information about a team member of a QuickPlace. In addition to this data, the member must be listed in the access control list (ACL) of main.nsf and in a group in names.nsf to pass authentication.

Table 12 sets forth the fields 180 used to define members 190.

---

**TABLE 12: FIELDS USED TO DEFINE MEMBERS**

---

<u>Field Name</u>	<u>Description</u>
h_Password	This member's password. Encrypted with @Password
h_FirstName	This member's first name
h_LastName	This member's last name
h_PhoneNumber	This member's phone number
h_EmailAddress	This member's email address

---

Table 13 sets forth the fields 180 used to define



Groups.

---

TABLE 13 FIELDS USED TO DEFINE GROUPS

---

<u>Field Name</u>	<u>Description</u>
h_Members	The list of members who belong to this group, listed in full heirarchical format.

---

#### *Subroom Member Object*

10 A subroom member object 192 is a subset of entries in the main room 174 of a QuickPlace. The Domino equivalent is a Data note in contacts1.nsf. Subroom member 192 has a similar structure to a room member 174, but specifies user-access to the SubRoom. These SubRoom members 192 are a subset of the (main) room 174 members list. This means that to grant access to new users, they must first be added as

15 readers (or greater) in the main room 174.

#### *SubRoom Object*

A subroom object 194 is a container within a QuickPlace with separate security to main Room. The Domino equivalent



the URL is built in the Main Room using either the "h\_Area" view or the "h\_TOC" view to create the path. This View contains the "h\_LocDbName" field as the first sorted column.

### ***Resources Object***

5           A resources object(not shown) is database of shared resources, having as its Domino equivalent NSF Database. It serves as a centralized container for resources required in all QuickPlaces on a server. Images, layout files and fonts are stored in this database. For example resources such as  
10       the button that appears beside the simple search image "Go.gif" is stored in this database. The easiest way to find items in this database is by scrolling through the h\_SystemNameView. A dummy form may be used to view such elements.

### ***Common QuickPlace Object Fields***

15           In Tables 14 through 18, fields and Java Script variables in the h\_PageUI form are set forth. These include general fields which can be customized for each layout, fields to define publishing status, fields for defining

locations, fields for defining security, fields for defining workflow status, fields for defining calendars, respectively.

**TABLE 14: GENERAL FIELDS IN THE h\_PageUI FORM**

5	<u>Field Name</u>	<u>Description</u>
10	h_Authors	Names of Authors who can edit the document. This is a particularly important field when creating PlaceBots which modify the access control to documents.
	h_CurrentSkinName	Name of the Theme to be used in the page
15	h_CurrentSkinType	Name of the Skin to be used, such as Edit: "h_Edit", or for a custom Theme the ID: "c_E4257D50EE2DD800C12569440019C164"
20	h_FolderUNID	The system name of the folder the page belongs to. For example: "4695CA1530263B3AC1256946005E965C" -the internal code for a Folder, or "" when the page only appears in the TOC.
25	h_Form	The id of the QuickPlace-Form used to create the page, for example: "30DF3123AEFAF358052567080016723D". Note, that the form referred to here is actually a data note and not a Notes Form.
30	h_IsInToc	If the page should appear in the TOC, it is set to "1". If it does not appear there, it is set as "".
	h_IsPublished	Set to "1" if the page should be visible to readers.

OBJECT "CH625260"

	h_IsSystem	1 = This is a system object.
	h_Name	The user visible name of this object.
5	h_Position	Number used to sort the pages within the TOC. These typically have values such as 10000. This value should be handled as a Long when referenced in LotusScript.
10	h_SystemName	The name of this object as known to the system.
15	h_Type	Describes what sort of note defines. This field is used in all Quickplace Design Notes to tell what sort of document is being referred to. It is what differentiates between the Objects in QuickPlace.  "0"= Page "1" = Folder "2" = Room "3" = Subroom "4" = Error Page "5" = RoomType "h_Agent" = PlaceBot "h_Member" = Member "h_HaikuType" = "h_Group" = Group "h_Form"= Form "h_Field" = Field "h_Skin" = Layout file "h_SkinGroup"= Skin Group. h_Name Name of the page.
20		
25		
30		
35	h_Originator	User name of the creator, such as "CN=User Name/OU=QuickPlaceName/OU=QP/O=ServerName"
40	h_TextAbstract	The abstract automatically created to summarize the page. This is useful in Java Script for displaying a summary of the text content in a document.
	PageBody	The content or "body" of the page.

If using the Java Script "document.write" method to write out HTML content in a QuickPlace element, such as an imported page, skin and so on, it is normal to do this via the PageBody field. This field can be printed onto the screen via a document.write (PageBody) method called in a QuickPlace document. To do this in a page, the document.write method is used to print the contents of this field to the page.

System objects have special meaning depending on the type of object. The following tables describe fields in various QuickPlace Object types.

**TABLE 15: FIELDS USED TO DEFINE PUBLISHING**

<u>Field Name</u>	<u>Description</u>
h_IsPublished	1 = This object is currently published
h_IsHidden	1 = This object is not shown to the user
h_SetReadScene	The name of the default scene (subform) to use when viewing this object
h_SetEditScene	The name of the default scene (subform) to use when editing this object
h_PublishedVersionUNID	If this object is being edited and the current object is the draft version, the UNID of the published version of this object.

	h_DraftVersionUNID	If this object is being edited and the current object is the published version, the UNID of the draft version of this object.
5	h_LastTimePutAway	The last time that this object was changed: Published or Saved under construction.

**TABLE 16: FIELDS USED TO DEFINE FOLDERS LOCATION**

	<u>Field Name</u>	<u>Description</u>
10	h_FolderUNID	The name or UNID of the Notes Folder where this page resides.
	h_IsInToc	1 = This object is shown in the Table of Contents (sidebar).
15	h_CurrentPosition	The position of this object with respect to other objects in the collection.
	h_SetParentUNID	If this is a child or response object, the UNID of the parent object.

20 **TABLE 17: FIELDS USED TO DEFINE SECURITY**

	<u>Field Name</u>	<u>Description</u>
25	h_Readers	If this object is protected from readership, the list of names, groups, and or roles that can read this object.
	h_Authors	If this object is protected from authorship, the list of names, groups, and or roles that can

author this object.

---

### *Customizing the Object Model*

While much of a QuickPlace can be customized via a browser, there are some parts of QuickPlace which can only be customized using a Notes Client and or the Domino Designer.

Changes that can be made via a browser, using Web authoring tools such as an HTML editor relate more to the user interface. For example, editing a skin can be done using an HTML editor. Changes made to QuickPlace Objects are done through the Notes client and in Domino Designer. For example, inspecting and customizing the images appearing in default QuickPlace pages must be done via the Notes Client.

### *QuickPlace Object Model and HTML: Building URLs*

Building URLs in a QuickPlace is an important issue, due to the fact that QuickPlace is a browser based



application. Understanding QuickPlace URLs is also a good way of understanding the object hierarchy in QuickPlace. The relationship between URLs and the QuickPlace Object model flows in both directions. Understanding the structure of URLs helps understanding the QuickPlace Object model. Conversely, once the QuickPlace object model is understood, how to use URLs to manipulate a QuickPlace becomes apparent.

URLs in QuickPlace use the same structure as in Domino. Domino URLs allow locating documents by using the key value of the first sorted column of a view, then generate a URL to link to a document using this key. Once the documents are located, they are not always opened in the browser. Sometimes they are read and their contents exposed and used by other objects.

An example of locating a file without opening it is when a QuickPlace skin accesses a Java Script LSS file. The user never sees the LSS page, but its contents are used by the visible page to render objects and perform functions. To locate a document in Domino, the initial part of the URL is pointed to the host server, then the database containing the required document. The next part of the URL must point to a view with the first column specified as being sorted. This first, sorted column becomes the key column. Then a

URL is used to open the document, as in the following example:

`http://Host/Database/View/Key?DominoURLCommand`

5      Where:

View:      is the name of the view. To access a document regardless of the view, substitute a zero (0) for the view name and specify the document by its universal ID.

10      Key:      is the string, or key, that appears in the first sorted or categorized column of the view. If the key has spaces in it, substitute these for plus signs when creating a URL.

15      This syntax is used to open, edit, or delete documents and to open attached files. Domino returns the first document in the view whose column key exactly matches the Key. There may be more than one matching document; Domino always returns the first match. The key must match completely for Domino to return the document. However, the match is not  
20      case-sensitive or accent-sensitive.

DominoURLCommand: Is the instruction to Domino of what to do with the file when found. For example, ?OpenDocument, ?EditDocument and ?DeleteDocument.

5 If this DominoURLCommand is omitted a default will be substituted. For example, in the previous URL if the OpenDocument argument is omitted in a URL command the document will still open because the command is automatically interpreted as OpenDocument.

10 The structure of URLs in a QuickPlace is the same as in any Domino database. QuickPlace objects are quite often referred to via relative URLs. For example, to reference a page that has been created, the following syntax is used:

15 ../../h\_View/PageName?OpenDocument

Where: " ../../" section at the front of the URL creates a relative URL, is interpreted by the Domino server as referring to the parent objects of the current object (h\_View and PageName).

20 Examples:

LOT9 2000 0025 US1

[http://www.mercury.com/register.nsf/Registered+Users/Ja  
y+Street?OpenDocument](http://www.mercury.com/register.nsf/Registered+Users/Ja<br/>y+Street?OpenDocument)

[http://www.mercury.com/register.nsf/0/466c5172561e1c5c8  
52566c2005f6bbb?OpenDocument](http://www.mercury.com/register.nsf/0/466c5172561e1c5c8<br/>52566c2005f6bbb?OpenDocument)

5 Many QuickPlace objects in QuickPlace have internal names beginning with "h\_". This is refers to the internal name of QuickPlace which is "Haiku". To reference images, Java Script library files or files other than pages, the following syntax can be used...

10        ../../h\_Index/Document+Name/\$File/Imagename.gif?  
OpenElement

Or...

        ../../h\_Index/Document+Name/\$File/ScriptLibName.js?Open  
Element

15 Many objects in QuickPlace can be located via the h\_Index View. It contains links to many of the published objects in a QuickPlace. When referencing a Java Script file the ?OpenElement argument is used. This is to tell Domino that the file being accessed is not a page to open, which is the

default action.

### ***Building URLs: Referencing Images***

5 The following section deals with the issue of using  
images in QuickPlace. Referring to Figure 6, due to the  
fact that QuickPlace is a platform for creating Websites,  
images 242, 252 form a vital part of the QuickPlace object  
model. QuickPlace's structure provides many ways to include  
images in pages. For example when creating skin files 260,  
the images 242 are automatically uploaded into the  
10 QuickPlace 172 when the skin file 230 is uploaded.

Described hereafter are techniques involved for fully  
automated importing procedures within QuickPlace. An  
example of an automated importing would be when creating and  
uploading a Microsoft Word file 250. When this is done the  
15 images are imported without any interventions.

There are also instances where some developer  
intervention is required, such as when creating a Skin file  
230, or writing an importable HTML file 254, or referencing  
files required to display the results of PlaceBot and so on.

Creating skin files are fully described hereafter in connection with themes.

Three methods are used for importing images. These are:

5           Method 1: Provide a URL to an image and let QuickPlace upload the image. This method is used when creating skins and imported HTML documents that do not use Java Script to reference images.

10           Method 2: Create a URL, have QuickPlace upload it, then reference it using HTML or Java Script. This method is used when rendering image using Java Script.

15           Method 3: Manually upload images into a document and reference them via URLs from a separate document. This method is used if the image is very large and it desired to have the user's browsers be able to cache the image; or if the image is referenced within a Java Script function (QuickPlace does not import images when they appear within Java Scripts); or the image is referenced within a PlaceBot which creates new pages.

20           The solutions selected for a particular application may

be a mixture of all three. For example:

Referencing Images: Method 1. Create a Skin file or HTML imported page and let QuickPlace import it. This works in skins and imported HTML, and is the easiest way of  
5 importing images into Skins and HTML Pages. When a valid link to an image within an HTML page or a Skin is created, QuickPlace will upload it automatically when the Skin or HTML file is uploaded. For this to work, a valid URL must be created. This may be done as follows:

10 In the skin file or importable HTML document, download all the images in a local directory. The simplest way to do this is to save them in the same folder as the skin or HTML page. For example, the URL for an HTML file may be:

15 ``

Referencing Images: Method 2. Prompt QuickPlace to import the file into the current document, then reference the file using Java Script. This method is the most  
20 efficient method to use when referencing an image via a Java Script function (in a Skin for example) or when updating a

document via a PlaceBot.

To force QuickPlace to upload the image, a valid URL to the image at the top of the page must be created. By rendering it in a 1 pixel x 1 pixel size, making it too small to see, the image is still uploaded, but the user will not notice the image. The images must also be named when they appear in their 1x1 pixel format. By using this name, the image is made available to Java Scripts below it on the page. This is done by adding the image to the source code near the top of the page. To force QuickPlace to upload the image, it is rendered in HTML format, then the uploaded image referenced in the Java Script.

### ***Overview: Skins, Theme of a Place***

In accordance with a preferred embodiment of the invention, skins provide (1) a method for controlling the layout of QuickPlace user interface components, and (2) a method for controlling the style of the Quickplace user interface. Layout defines where components should appear, and look defines font, color, and background images.



Referring to Figure 6, these are achieved via html pages 244. An html page 244 is imported to the place 172 that describes where each component should fall, and also a style sheet 246 is imported specifying fonts, size, colors.

5        Each component of a QuickPlace user interface is individually addressable and placed on an html page 244. A style page 246 enables the user to define look by dragging and dropping the html pages and style sheet to the output control 240. A developer can code 256 an html page 244 that  
10        addresses the QuickPlace user interface components and style sheet 246 and upload to QuickPlace 172 to convert them into a skin 260.

15        In accordance with the preferred embodiment of the invention, html pages and style sheets are rendered responsive to QuickPlace tags to allow an end user to import these into a place and instruct that place to use these to instantiate the user interface.

#### ***Overview: Place Types***

In accordance with a further embodiment of the

invention, a QuickPlace may be converted into a template from which new QuickPlaces may be created. In accordance with this method, a QuickPlace is created, including a configuration of membership, forms, PlaceBots and skins to match the needs of team project. The resulting QuickPlace, an entire web site collaborative space, then is converted into a template from which new QuickPlaces can be created with the same configuration.

### *Skins/Themes*

A skin provides the layout, and look and feel of a QuickPlace. Layout refers to the positioning of components on a page, and which to include. Referring to Figure 5, the components of a page 340 include logo 342, table of contents (TOC) 346, actions 344, tools 348 and page content 350.

A browser user experiences skins at the QuickPlace user interface. That is, the QuickPlace is presented through a skin, which define the layout of components of a page, and its look and feel (including styling of colors, fonts and images).

There are several audiences for skins (aka, themes).

(A skin refers to the user interface embodiment, and a theme to the developer kit embodiment of the same object.) First, end users can choose a theme from a gallery of themes in the UI, allowing them to choose a visual site design to express identity of the team or project, thus to choose a look and feel that suits the work to be done. Second, developers may use a theme to rebrand a QuickPlace for an in house application; to integrate the QuickPlace with other network resources by including a link to a support page; and to integrate QuickPlace seamlessly with an existing web site design.

Thus, skins provide a site template which allow developers to provide themes for embedding of a QuickPlace in a larger web based service. QuickPlace can be used as a team collaboration component of a web site.

A skin or theme is implemented as some HTML code with QuickPlace HTML tags, and a style sheet (CSS, or cascading style sheet), including five HTML layouts and one CSS. In accordance with the preferred embodiment of the invention, skins not only deal with look and feel, but adding links to other resources are used as a development tool both by end users and developers.

Technically, a skin has five designer layouts comprising a skin group which define different display modes supported by QuickPlace, including (1) page read mode, (2) page edit mode, (3) folder list/response, (4) folder headline, and (5) folder slide show.

In accordance with the invention, developers are provided an underlying, server-based architecture which allows caching and dealing with themes. The five layouts and their interaction with the style sheet provide a custom theme user interface, flexibility is defining and selecting user specific themes and client specific themes, decorating by choosing a them, and decorating by tweeking a theme.

A user can choose a theme from a gallery of themes built on top of an underlying themes architecture, which provides the users the ability to subsequently modify the HTML from the user interface. Also, an administrator of a QuickPlace can build customized user interfaces to a corporate style. Tweeking allows users to change basic properties like fonts and colors through a user interface to specific classes in the style sheet. Such a user selects colors and fonts, for example, and QuickPlace feeds those selections into the theme style sheet.

Thus, the underlying themes architecture enables a very simple user interface enabling end users selection and tweeking of themes.

Custom themes provide a powerful user interface to developers. A web developer with HTML and CSS skills can learn to create a theme. A theme is simply HTML and support for Java Applets (logic that processes information and conditionally displays one or a different picture depending upon some decision, such as user group, for example). A custom theme is a simple UI, and upload control, which allows importing of pages into QuickPlaces, has been enhanced to allow developers to pull a theme into a QuickPlace using HTML tags that refer to different components in the layout. The theme is created at the server by QuickPlace, and the user can use the QuickPlace UI at the browser without learning new skills beyond existing web skills.

A user specific theme are used by a program at the server which, upon detecting the identity of the browser user, selects the theme for that user. An example would be an accessibility theme tailored to the reading machines that blind people use. In such a case, the server would provide to the browser a user interface which is nicely structured

with content that reading machines can use.

5 A client specific theme has application, for example,  
with a personal computer or palm pilot, by which the server  
provides a PC or Palm specific theme. A theme specify XML  
content, which allows for selective processing of the  
QuickPlace: a theme skin in html can act on that content  
differently. xml allows for logic to be applied to the  
content of the QuickPlace.

10 Tweaking and choosing themes use existing browser  
functions, with a layouts architecture mapped to skin  
components. This allows for tweaking of custom themes.  
Each piece of the user interface is implemented as a  
component. The style sheet controls style, and tweaks only  
modify the style sheet (not the layout).

15 Referring to Figure 9, the method of an exemplary  
embodiment of the invention for rendering a QuickPlace to a  
browser user interface is set forth. Responsive to a  
request 270, first with respect to the HTML, the server  
checks database 276 for the appropriate skin name, allowing  
20 also for access to DLL 274 for the user to select his own  
theme.

In step 280, the server determines if the selected skin is a skin group 286, 288 cached in memory 284. If so, in step 292 the selected skin group is processed to produce the HTML, including picking the skin and processing the tags, which are then sent to browser 112.

If in step 280 it is determined that the required skin is not cached, in step 282 the server accesses database 276 to retrieve the skin group, checking the current database and parents in order (through nested databases in a room). If the skin is not located in database 276, server goes to resources 278, which are shared across QuickPlaces. Upon finding the skin group, in step 290 it is cached to memory 284, and processed in step 292 as discussed above.

For the style sheet, the processing is a little different. The QuickPlace server builds four pieces: common style sheet, skins style sheet (from Figure 9 processing), and tweaks that affect the style sheet. The color set is found in resources 278, and tweaks are picked from database hierarchy 276.

See print screen version of table of contents of devzone description of skins.

## ***Customizing QuickPlace Themes with HTML***

As previously noted, a QuickPlace theme controls the look and the layout of a QuickPlace -- that is, its fonts and background colors, how an element looks when it is selected, where the navigational controls appear, and so on. When creating a QuickPlace, a theme may be selected by choosing from a gallery of predefined themes, an existing theme may be selected, or a new theme created.

Using a custom theme can give a new QuickPlace a strong brand identity, designing it to look like other corporate sites, or supplying additional functionality as well as a unique look.

### ***Custom themes and HTML***

Themes are implemented using the QuickPlace skins architecture and are defined using HTML 244, so to customize a theme, the HTML 244 is created or modified using any HTML editor 124 and then the modified files uploaded to QuickPlace. QuickPlace provides a set of custom HTML tags to use to define the elements in each layout. A skin, therefore, comprises HTML and QP tags.



When customizing a theme, all of the power of HTML is available to add functionality to a QuickPlace. Following are some ways to enhance a QuickPlace using custom themes:

1. Apply the corporate brand identity to a QuickPlace or create a custom graphic identity for a collaborative application.
2. Integrate a QuickPlace seamlessly as a collaborative component within a larger corporate Web site.
3. Provide links from a QuickPlace to other Web sites such as corporate Web sites, eCommerce sites, or to customer support services.
4. Make new features available by embedding ActiveX controls or Java applets in the custom theme.
5. Use Java Script to program dynamic effects into the custom theme.

### *Custom Themes and Place Types*

When a theme is customized, it may be kept as part of a template from which to build similar QuickPlace applications. To do this, the QuickPlace is saved containing the custom theme as a custom Place type, which  
5 can then be used for creating new QuickPlace applications.

### *Anatomy of a QuickPlace Theme*

Each theme is composed of a group of layouts that define the appearance of specific QuickPlace components. For example, the layout for a page differs from the layout  
10 of a folder, but they will probably share some style elements as part of a common theme. Table 18 sets forth the layouts and style sheet of a QuickPlace theme.

---

**TABLE 18: SKIN GROUP COMPONENTS**

---

<u>Layout</u>	<u>File type</u>	<u>Purpose</u>
15 Page	.htm	Defines the appearance of a page being read

	Page editing	.htm	Defines the appearance of a page being edited
	List folder	.htm	Defines the appearance of a List or Response folder
5	Headlines folder	.htm	Defines the appearance of a Headlines folder
	Slideshow folder	.htm	Defines the appearance of a Slideshow folder
10	Stylesheet	.css	Defines styles such as fonts and colors for all layouts

---

In most cases, a single theme can be used to customize the look of page, list folder, and slideshow folder.

Additionally, JPEG or GIF graphic files can be imported to represent a theme in the Custom Theme Gallery.

15 Table 19 shows the components that can be customized for each layout.

TABLE 19: CUSTOMIZABLE LAYOUT COMPONENTS

	Component Name	Page	List	Slideshow	Headlines	Edit
			folder	folder	folder	
5	Logo	x	x	x	x	x
	Page content	x	x	x	x	x
	Actions	x	x	x	x	x
	Help	x	x	x	x	x
	Table of Contents	x	x	x	x	
10	Path	x	x	x	x	
	QuickSearch	x	x	x	x	
	WhatsNew	x	x	x	x	
	AdvancedSearch	x	x	x	x	
	SignIn	x	x	x	x	
15	Offline	x	x	x	x	
	Chat	x	x	x	x	
	Notify	x	x	x	x	
	Print	x	x	x	x	
	Tutorial	x	x	x	x	
20	PageTitle	x	x		Note 1	x
	Navigation	x	x	x	Note 2	
	Jump	Note 3	x	x	Note 2	
	AuthorandModified	x	Note 3	x	x	
	Revision	x	Note 3	x	x	
	HeadlinesFolder				x	

Notes:

1. Although the PageTitle component can optionally be included in a Headlines folder, this component would normally be omitted and the page title displayed prominently instead.

5 2. The Headlines Folder is designed to provide a headlines style of navigation in place of the previous/next navigation used in other folder types. Therefore, the Navigation and Jump components are not normally used in the Headlines Folder layout.

10 3. The Jump component can be included in the Page layout and the AuthorAndModified and Revision components in the ListFolder layout. These components will all display as "empty", using the HTML parameter emptyFormat.

---

***Modifying an Existing Theme***

15 In accordance with a preferred embodiment of the invention, a QuickPlace theme is customized by beginning with the theme closest to what is desired, extracting the HTML source files for the theme, customizing them, and uploading the modified files as a custom theme.

This process is as follows, from the QuickPlace user interface:

1. Choose Customize - Decorate - Click here to choose a theme.

5 2. Select the theme that most closely represents the look and layout desired for the QuickPlace and click the Done button.

QuickPlace applies the selected theme. The user then proceeds:

10 3. Select Customize - Custom Themes - New Theme.

4. Enter a name for the theme you being created and click the Done button.

QuickPlace returns to the Custom Themes page.

5. Click the theme name specified in step 4 to edit it.

15 QuickPlace displays the Edit Theme page with a file associated with each layout.

## ***Viewing an HTML File***

To view or modify the source code for a layout, the file is dragged to the desktop and opened in an HTML editor. If using an editor such as HomeSite that supports in-place editing, right-click a file name and choose the editor from the right-click menu. This opens the editor within QuickPlace. Changes you made to the HTML file are automatically uploaded when saving and exiting the editor.

The original source file can also be modified in an HTML editor, and the Reload button clicked from the Edit Theme page to reload the modified file.

## ***Creating a Custom Theme***

To create a custom theme, the existing layout files are modified or new layout files created. In either case, a name is assigned and the layout files upload. The procedure is as follows:

## ***Modifying Layout Files***

1. Choose Customize - Custom Themes

2. Click the New Theme button.
3. Enter a title and an optional description for the new theme.
4. Choose a layout to modify and click the Browse button to locate the HTML file for the layout.
- 5
5. Select the file from the file system and click OK to upload the .htm file for the layout.
6. Repeat to upload files for other layouts or for the theme style sheet.
- 10 7. Click the Done button to save the custom theme.

### ***Generating Layout Files***

As a theme is developed, QuickPlace can take the code from one layout and apply it to all layouts for which a file has not been explicitly supplied. This is a shortcut for applying a common look and feel to multiple layouts.

15

This feature also allows one to develop a custom theme



in stages, replacing generated layouts with custom files as the theme progresses.

To generate layout files based on a layout:

1. Choose a layout and click the Browse button to locate the HTML file for the layout.
2. Select the file from the file system and click OK to upload the .htm file for the layout.
3. Click the Generate button to populate the other layouts with files based on this file.
4. Modify the generated files as desired.
5. Click Reload to upload a modified file.
6. Click the Done button to save the custom theme.

### ***Creating Layout Files Using the QuickPlaceSkinComponent Tag***

The HTML tag that controls the style and placement of

elements in a QuickPlace layout is the  
 <QuickPlaceSkinComponent tag>. The basic syntax for the  
 <QuickPlaceSkinComponent> tag is as follows:

#### Syntax

```

5    <QuickPlaceSkinComponent
      name="<skincomponentname>" (required)
      format="<format html>" (optional)
      selectedformat="<format html>" (optional)
      emptyformat="<html>" (optional)
10   delimiter="<html>" (optional)
      prefixHTML="<html>" (optional)
      postfixHTML="<html>" (optional)
      replaceString="STRING_1=REPLACEMENT_1 && ... && ..."
      (optional)
15   >
```

Table 20 sets forth skin component tag attributes.

---

**TABLE 20: SKIN COMPONENT TAG ATTRIBUTES**

---

<u>Attribute</u>	<u>Description</u>
name	Required. Specifies the name of the theme component being modified. Valid names are described below.



The <QuickPlaceSkinComponent> tag identifies a element or piece of the QuickPlace user interface for which to modify the look and placement. Customize the look and functionality of a QuickPlace application is done by  
5 modifying various elements and adding HTML or Java Script within the <QuickPlaceSkinComponent> tag.

The attributes PrefixHTML, PostfixHTML, Emptyformat, and Delimiter work together to help control what displays in a particular context. For example, an HTML string may to  
10 offer a set of instructions that go with a set of action buttons. When the action buttons are hidden, the text should be hidden as well.

#### Example

This example defines the layout and style of a Table of  
15 Contents.

```
<QuickPlaceSkinComponent
```

```
  Name=TOCSkinComponent
```

```
  Format="<tr class=h-tocRow-bg><td class=
  h-tocColumn-bg><Item class=h-toc-text></td></tr>"
```

EmptyFormat="<tr class=h-tocRow-bg><td class=  
h-tocColumn-bg></td></tr>"

SelectedFormat="<tr class=h-tocSelectedRow-bg><td  
class=h-tocSelectedColumn-bg><Item  
class=h-tocSelected-text></td></tr>"

>

### *Using the Item Tag*

Many of the components will contain a list of values,  
such as the items in a Table of Contents. In these cases,  
the HTML tag <Item> within the <SkinComponent> tag is used  
to iterate through the values in a list.

### Syntax

<Item

attribute="anchor|anchor.href|anchor.text|anchor.select  
ed" (optional)

class="class name" (optional)

>

5 where attribute is all or part of a fully qualified HTML link for the item in a list, and class is the name of the class defined in an associated style sheet. The class name is inserted into the anchor information for the item.

The attribute describing the HTML link can take one of the following forms:

- 10
- anchor returns all of the HTML that describes the item, including the URL, and associated text. For example, lotus.
  - anchor.href returns the URL for the value. For example, "www.lotus.com"
  - anchor.text returns text associated with the value, for example "lotus."
  - anchor.selected returns true if the value is selected, false if it is not.
- 15

T <Item> tag is used to select a value in a list. The attribute for the value identifies all or part of the HTML link that describes a particular value in a list. Use the class attribute to add styles defined as a class in an associated style sheet.

#### Example

This example defines the look and style of a Table of Contents.

```
<QuickPlaceSkinComponent
name=TOCSkinComponent

Format="<tr class=h-tocRow-bg><td
class=h-tocColumn-bg><Item class=h-toc-text></td></tr>"

EmptyFormat="<tr class=h-tocRow-bg><td
class=h-tocColumn-bg></td></tr>"

SelectedFormat="<tr class=h-tocSelectedRow-bg><td
class=h-tocSelectedColumn-bg><Item
class=h-tocSelected-text></td></tr>">
```

## Using HTML

Because the Page, ListFolder, and Slideshow layouts share so many common components, one HTML file that applies styles to these three layouts can be created. HTML for the Slideshow Folder is created, which contains the superset of components used in the three layouts. To control how the non-applicable components display for a layout -- for example, the Jump component for the Page layout, and the AuthorAndModified and Revision components for the ListFolder -- various results are achieved by setting the emptyFormat, prefixHTML, and postfixHTML parameters.

For example, to have the empty components occupy the same vertical space as they do when in use, set the parameter as follows:

```
emptyFormat = "&nbsp;"
```

By placing each component in a separate table row, the component's row "collapse" when it is empty, so that it occupies no space. Given that the prefixHTML and postfixHTML parameters are not output when the component is



empty, these parameters can be used to provide the following table structure:

```
emptyFormat = ""
```

```
prefixHTML = "&lttr>&lttd>"
```

```
5 postfixHTML = "</td></tr>"
```

### ***Style Sheet Selectors in QuickPlace***

Referring to Figure 5, a typical QuickPlace user interface 370 includes a sidebar (TOC) 372, page title 374, author and modified field 376, actions bar 378, logo 380, path 382, page content 400, and actions buttons, such as quick search 384, advanced search 386, what's new 388, chat 390, notify 392, print 394, tutorial 396 and help 398. Each of these is customized by using tags or selectors which deal with borders, background, text, and so forth, in accordance with a style sheet.

A standard default style sheet is always output with any theme, so that one need only to specify the selectors

that are to be changed. Undefined properties will fall back to those defined in the default style sheet.

Tables 21 through 26 describe Style Sheet (CSS) Selectors.

5

**TABLE 21: Style Sheet Tags**

<u>CSS Selector</u>	<u>Description and Notes</u>
body, td	Default text style. Note: specify both tags to set the default text style.
a	Anchor style. Note: see also several other more specific anchor styles, below.
a:hover	Default style of anchors when mouse is over the anchor. Note: IE only.
form	Default style of forms. Note: The margin-bottom property is set to 0px by default to remove unwanted whitespace from the bottom of all forms.

(Note: Other tags, such as h1, h2, etc., can also be styled as needed.)

**TABLE 22: Page Background**

<u>CSS Selector</u>	<u>Description and Notes</u>
.h-page-bg	Page background. Note: class assigned to body tag of all pages. For IE only, the margin properties can be set to control the

**TABLE 23: Text and fields in Page layout**

<u>CSS Selector</u>	<u>Description and Notes</u>
5 .h-field-text, .h-field-text td	Style of the text value of a field. Note: use this exact selector, as shown, to style field text distinctly from regular page content.
10 .h-pageSmall-text	"Smallprint" page text.
.h-fieldSmall-text	"Smallprint" text content of fields.
.h-fieldHeader-bgtext	Field header.
15 .h-fieldOrder-bgtext	Number to the left of the field header.
.h-page-text a:visited	Anchors inside the pageContent skin component which have been visited. Note: IE only.

**TABLE 24: Edit Layout**

<u>CSS Selector</u>	<u>Description and Notes</u>
.h-fieldHeaderEdit-bgtext	Field header
25 .h-fieldEdit-text, .h-fieldEdit-text td	Field description text. Note: use exact selector, as shown.

```
.h-fieldOrderEdit-bgtext, div
.h-fieldOrderEdit-bgtext td Number to the left of the
                             field header. Note: use exact
                             selector, as shown. All
                             properties in this selector
                             must be marked ! important to
                             take effect. E.g., color:
                             green! important.
```

<code>.h-fieldSmallEdit-text</code>	Small field text. Note: all properties in this selector must be marked ! important to take effect.
-------------------------------------	--

<code>.h-fieldSpecialEdit-text</code>	Special field text. Note: used in Task Info field. All properties in this selector must be marked! important to take effect.
---------------------------------------	--

**TABLE 25: QuickSearch**

<u>CSS Selector</u>	<u>Description and Notes</u>
<code>.h-searchField-text</code>	Style of the text field associated with the quickSearch skin component.

**TABLE 26: Classes defined by the default theme**

The classes listed below are not built into QuickPlace, but are defined by the default theme's stylesheet. (Custom themes are not required to use these classes, and are free to define any other classes as appropriate.) However if modifying the default theme, these classes can be modified to get a particular effect.

Description and Notes

$\frac{F_{\alpha}^{(n)}(\lambda)}{\Gamma(n+1-\alpha)} = \frac{F_{\alpha}^{(n)}(\lambda)}{\Gamma(n+1-\alpha)}$

headline folder.

.h-headlineFolderTabSelected-bg Background of selected  
tab in headline folder.

5 .h-headlineFolderTabSelected-text Text of selected tab in  
headline folder.

.h-edit-bg Background of edit layout  
"docket".

.h-actionButtonEdit-text Text of action button in  
edit layout.

10 .h-actionButtonBorderEdit-bg Border of action button  
in edit layout.

.h-actionButtonEdit-bg Background of action  
button in edit layout.

15 .h-shadow-bg Shadow. Note: used in  
sidebar and in edit  
layout "docket" shape.

.h-shadowCorner-bg "Missing" corner of  
shadow area.

---

### ***File System Directory Architecture***

20 In accordance with the preferred embodiment of the  
invention, every new QuickPlace created gets its own  
directory under the QuickPlace master directory. The name  
of that directory is same as the name of the QuickPlace.  
Each additional room in the QuickPlace is another file  
25 (.nsf) in the QuickPlace directory. During the QuickPlace  
server installation, the default QuickPlace (also called the

"Welcome" QuickPlace) with the name of QuickPlace is automatically created. This is the entry point to the QuickPlace server including the server administration. Figure 8 shows the directory structure, along with the files in "Welcome" QuickPlace, in a stand-alone QuickPlace server.

For example if Millennia is the a current QuickPlace, then the basic infrastructure of the Millennia QuickPlace resides under

\lotus\domino\data\quickplace\millennia

10 (on Domino server - given that

\lotus\domino\data

is the data directory) or

\lotus\quickplace\data\quickplace\millennia

(on stand-alone - given that

15 \lotus\quickplace

is the QuickPlace installation directory).

When QuickPlace server is installed, the "Welcome" region or the "Administrator's Place" is pre-configured to allow an entry point to the QuickPlace server. An administrator can then administer the newly installed QuickPlace server from this entry point. This so called administrative QuickPlace resides under the QuickPlace directory which in turn is under the data directory. For an example it is

c:\lotus\domino\data\QuickPlace\QuickPlace

when installed under Domino, and

c:\lotus\QuickPlace\data\QuickPlace

when in stand-alone mode. It contains the following files: Main.nsf, Contacts1.nsf, CreateHaiku.nsf, Admin.nsf. The templates for these Domino databases reside in the directory named AreaTypes. The "Welcome" page may be configured to suit the needs of an organization.



## Customizing QuickPlace: Templates (AreaTypes or Place types)

Some QuickPlaces can be reused over and over again. For example, a QuickPlace to track a project. To avoid tailoring each QuickPlace from scratch, popular QuickPlaces can be saved as templates called Place types in the QuickPlace environment.

Referring to Figure 11, by way of example, assume a QuickPlace called MyProject 472 is created with one room, called "Status Meeting", that has created a PageLibrary 474 file. Each room resides in its own PageLibrary file. The newly created Place type gets its own directory 476 under AreaTypes 478. Figure 11 also shows the default Domino template files (.ntf) 480 that the QuickPlace server uses to create, when demanded by the end-users, all the subsequent QuickPlaces. Help and Tutorial QuickPlaces which were created during the installation process also use some of the same templates.

### *Places*

Referring to Figure 12, places are the QuickPlaces administrators and users create on the server. Each



QuickPlace. Anonymous allows everyone access without authentication.

### ***Working With QuickPlace Place types***

5 An existing QuickPlace may be used as a model, or  
template, for a new QuickPlace. A QuickPlace used as a  
template for a new QuickPlace is called a Place type. For  
example, suppose a QuickPlace named "Meeting Place" is  
created and decorated that includes two pages, a folder  
called Issues, and an inner room. When Meeting Place is  
10 designated as a Place type on the QuickPlace server, users  
with the proper access can create one or more identical  
copies of Meeting Place, each including copies of the two  
pages, the Issues folder, and the inner room in the original  
Meeting Place. If Meeting Place is set up to allow it, a  
15 user who uses the Meeting Place Place type to create a new  
QuickPlace can then modify the new QuickPlace just as they  
would one they created "from scratch."

To create a QuickPlace using a Place type, a user  
clicks Create a QuickPlace, selects the name of the Place  
20 type from a list, and enters the name for the new  
QuickPlace, a user name, and a password. A manager of a

QuickPlace designated as a Place type may limit the types of changes QuickPlace creators can make in QuickPlaces based on that Place type. For example, the manager of a QuickPlace called Marketing Projects could dictate that the Decorate options not appear in any Place type based on the Marketing Projects QuickPlace.

In accordance with a preferred embodiment of the invention, collaboration space users may:

1. Create a Place type.
2. Create a description of a Place type for the list of Place types. QuickPlace creators see when they begin to create a QuickPlace
3. Display source information for a Place type, for example, the name and address of the QuickPlace on which the Place type is based.
4. Edit the Place type description
5. Hide or redisplay the names and descriptions of Place types in the list of Place types QuickPlace creators see.

6. Reorder the names of Place types in the list of Place types QuickPlace creators see.

7. Update a Place type when the QuickPlace on which the Place type is based changes.

5 8. Copy a Place type from one server to another.

9. Add a Place type copied from another server to the list of Place types on the current server.

10. Delete a Place type.

11. Update a Place type-based QuickPlace when the Place type changes.

### ***Creating a Place type***

To create a Place type based on a QuickPlace on the current QuickPlace server:

1. In the Address or Location box in the browser, enter the address of the QuickPlace server.

2. Click SignIn in the top right corner of the QuickPlace window.

3. Enter the user name and password used when QuickPlace was first installed on the server.

5 4. Click Place types in the sidebar.

5. Click Create Place type.

6. Enter a name for the Place type. The name entered here appears in the list of Place types a user sees when he or she clicks Create a QuickPlace to begin creating a QuickPlace.

7. Select the name of the QuickPlace to use as a Place type.

8. Click Next.

### ***Creating a Place type Description***

15 Referring to Figure 13, when a user clicks Create a

QuickPlace on a server that includes multiple Place types, a list of Place type names appears on the screen. To help the user understand the Place type choices available to him or her, a list is set up such that some or all of the

5 references to Place types include one or more of the following: a two- or three-line description 494 of the Place type; a thumbnail sketch of the Place type 496; and a link 498 to another Web page that includes a more detailed description of the Place type. The manager of a QuickPlace

10 can also create a description for the Place type to be derived from his or her QuickPlace. If the manager of a QuickPlace has already created a description for the Place type for his or her QuickPlace, one who subsequently uses that Place type cannot edit the description.

15 A Place type description is created as follows:

1. In the Address or Location box in the browser, enter the address of the QuickPlace server.
2. Click SignIn in the top right corner of the QuickPlace window.
- 20 3. Enter the user name and password used when QuickPlace was first installed.

4. Click Place types in the sidebar.

5. Click the name of the Place type for which a description is to be created.

6. Click Edit.

5 7. Under "Update this Place type with the latest changes from QuickPlace name," click "No, simply update the information below."

8. Enter a two or three line description 494 of the Place type. The description appears next to the Place type name 500 in the list of Place types a user sees when he or she clicks Create a QuickPlace. For example, one could enter the text, "Supports team members who want to meet in a secure space on the Internet. Includes a folder called Action Items and an inner room called Design Proposals."

15 9. Choose an image file that contains a "thumbnail sketch" 496 of a page in the Place type. The image file must be an .GIF or .JPG file, and the image itself should be small - no larger than 100 pixels by 80 pixels. The thumbnail sketch 496 appears next to the Place type name 500 in the list of Place types a user sees when he or she clicks Create a



QuickPlace.

Click Browse.

5 In the dialog box that appears on the screen, choose the folder that contains the image file to use, and then select the name of the file.

In the dialog box on the screen, click Open.

10 10. If QuickPlace creators are to be given more information about the Place type than can be supplied in the description box 494, create a separate QuickPlace that contains, for example, an entire page that describes the Place type, and then specify the address of that page under "Optionally, you can provide a URL for users to visit for more information." When the address of a Web page is specified, QuickPlace displays the link text "More info" 498 below the description 15 494 of the Place-Type in the list of Place types. When a user clicks the link, QuickPlace displays the contents of the Web page at the address specified.

20 If the Web page that contains the detailed information is on the current QuickPlace server, enter an abbreviated address that begins with a / (forward slash). For example, LOT9 2000 0025 US1 105

if the current QuickPlace server is called TestServer and the address /QuickPlace/acme/main.nsf is entered, the address will be interpreted as

http:// testserver/quickplace/acme/main.nsf.

- 5 If the Web page that contains the detailed information is on another server, the full address of the Web page is entered. For example, if the Web page is the Welcome page in a QuickPlace called Acme on a server called HighTestServer, one would enter the address

10 http:// hightestserver/quickplace/acme/main.nsf.

11. Click Next.

### Displaying Source Information for an Existing Place type

- 15 One can display the name and address of the QuickPlace on which an existing Place type is based. If a description is provided for the Place type, the description appears when displaying source information for a Place type. One cannot display source information for the default Place type. The

default Place type is the Place type QuickPlace installs automatically when installing QuickPlace. The default Place type defines the structure of all QuickPlaces on the server if no user-created Place types exist on that server.

## 5 Editing the Description of a Place type

One can edit the description 494 of an existing Place type; specify a new image file 496 to display next to the Place type name that appears when a user clicks Create a QuickPlace; and change the link 498 users can click to display a detailed description of the Place type. The description of the default Place type QuickPlace installs on the QuickPlace server cannot be edited.

1. In the Address or Location box in the browser, enter the address of the QuickPlace server.

2. Click SignIn in the top right corner of the QuickPlace window.

3. Enter the user name and password used when QuickPlace was first installed on the server.

4. Click Place types in the sidebar.

5. In the list of Place type names on the screen, click the name of the Place type for which to create a new description.

5 6. Click Edit.

7. Click "No, simply update the information below."

8. Make one or more of the following changes: change the text description for the Place type; add an image to the Place type description or replace an existing image; enter the address of a Web page that describes the Place type in more detail or change the existing address.

9. Click Next.

### **Hiding and Redisplaying Place type Names**

One can hide the name of a Place type in the list of Place types users see when they click Create a QuickPlace, for example, if experimenting with the contents of the Place type and not yet ready to make it available to QuickPlace

creators. The word "hidden" appears next to the name of the Place type in the list of Place types seen as the QuickPlace server administrator.

5 1. In the Address or Location box in the browser, enter the address of the QuickPlace server.

2. Click SignIn in the top right corner of the QuickPlace window.

3. Enter the user name and password used when QuickPlace was first installed on the server.

10 4. Click Place types in the sidebar.

5. Click Show/Hide.

15 6. Do one of the following: to hide the name of a Place type in the list, remove the checkmark next to the name of that Place type; or to display the name of a Place type in the list, check the box next to the name of that Place type.

7. Click Next.

## Updating a Place type

If the manager of a QuickPlace on which a Place type is based changes that QuickPlace — for example, by adding a room to the QuickPlace — the Place type can be updated to reflect those changes.

1. In the Address or Location box in the browser, enter the address of the QuickPlace server.

2. Click SignIn in the top right corner of the QuickPlace window.

3. Enter the user name and password used when QuickPlace was first installed.

4. Click Place types in the sidebar.

5. Click the name of the Place type to update.

6. Click Edit.

7. Click "Yes, copy changes and update the information below."

8. Click Next.

### Copying a Place type From One Server to Another

One can use operating system commands to copy a Place type from one QuickPlace server to another. A Place type consists of a set of Notes database files (.NSF files) in a subdirectory of the AreaTypes subdirectory on the QuickPlace server. Suppose, for example, QuickPlace is installed on drive C together with a Place type called Rapid Response. The .NSF files for Rapid Response would be stored in one of the following locations, depending on the type of QuickPlace installation:

In c:\QuickPlace\data\QuickPlace\AreaTypes\Rapid Response, if the server is a standalone QuickPlace server

In c:\Lotus\Domino\data\QuickPlace\AreaTypes\Rapid Response, if QuickPlace is installed on a Domino server

To copy a Place type from one QuickPlace server (server A) to another QuickPlace server (server B):

1. On server B, create a subdirectory for the Place type in

x:\QuickPlace\data\QuickPlace\AreaTypes (if the server  
is a standalone QuickPlace server) or

x:\Lotus\Domino\data\QuickPlace\AreaTypes (if the  
server is running both Domino and QuickPlace),

where x is the drive on which QuickPlace is installed.

For example, to copy a Place type called Design Issues to  
server B, a standalone QuickPlace server, one would create  
subdirectory x:\QuickPlace\data\QuickPlace\AreaTypes\Design  
Issues, where x is the drive on which QuickPlace is  
installed.

2. Locate the Place type files to copy and copy them from  
server A to the subdirectory created on server B.

3. Use the procedure outlined in the next section to add the  
Place type copied to the second QuickPlace server to the  
list of Place types seen when one signs onto that second  
QuickPlace server as the server administrator.



## Adding a Place type Copied From Another Server to the List of Place types on the Current Server

If operating system commands have been used to copy files for a Place type to the Place types directory on the current QuickPlace server, that new Place type can be added to the list of Place types on the current server. One sees the list of Place types upon signing into the current server as the server administrator and clicking Place types in the sidebar. The new Place type also becomes available to QuickPlace creators until or unless the name of the Place type is hidden.

Add a Place type copied from another server to the list of Place types on the current server, as follows:

1. In the Address or Location box in your browser, enter the address of the QuickPlace server.
2. Click SignIn in the top right corner of the QuickPlace window.
3. Enter the user name and password used when QuickPlace was first installed.

4. Click Place types in the sidebar.

5. Click Refresh List.

#### **Deleting a Place type**

5 When one deletes a Place type, QuickPlace deletes the Place type from the QuickPlace server and removes the name of the Place type in the following places: in the list seen when a user signs into the current server as the server administrator and click Place types; in the list a QuickPlace creator sees when he or she clicks Create a QuickPlace. One cannot delete the default Place type.

#### **Advantages over the Prior Art**

15 It is an advantage of the invention that there is provided a collaboration space application model for creating web applications that are aesthetically pleasing and present the user with a simple interface.

It is further advantage of the invention that there is

provided a method and system for creating web applications that are instantly created, instantly archived, team and project oriented, easy to use, created, accessed and administered via the Web, reusable, and extensible.

5           It is a further advantage of the invention that there is provided a method and system for creating a place in collaboration space by creating a first place; and saving the first place as a place type template from which other places may be created in collaboration space having the same  
10 look and feel.

### Alternative Embodiments

It will be appreciated that, although specific embodiments of the invention have been described herein for purposes of illustration, various modifications may be made  
15 without departing from the spirit and scope of the invention. In particular, it is within the scope of the invention to provide a computer program product or program element, or a program storage or memory device such as a solid or fluid transmission medium, magnetic or optical  
20 wire, tape or disc, or the like, for storing signals

readable by a machine, for controlling the operation of a computer according to the method of the invention and/or to structure its components in accordance with the system of the invention.

5

Further, each step of the method may be executed on any general computer, such as an IBM System 390, AS/400, PC or the like and pursuant to one or more, or a part of one or more, program elements, modules or objects generated from any programming language, such as C++, Java, Pl/1, Fortran or the like. And still further, each said step, or a file or object or the like implementing each said step, may be executed by special purpose hardware or a circuit module designed for that purpose.

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Accordingly, the scope of protection of this invention is limited only by the following claims and their equivalents.